Jason C. Ray | Partner
Tax

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Jason Ray advises employers on the design, implementation, and regulatory compliance of tax-qualified and nonqualified retirement plans. In addition to counseling clients on all aspects of employee benefits, Jason appears before the Internal Revenue Service ("IRS") and the U.S. Department of Labor to review penalty assessments, plan correction, and plan audit, among other benefits matters. Jason guides clients in employee stock ownership plan ("ESOP") transactions, including seller-financed and leveraged and non-leveraged buyouts as part of ownership succession transactions.

In addition to counseling clients on ESOPs, Jason designs and drafts Profit-Sharing Plans, 401(k) Employee Stock Ownership Plans ("KSOPs"), and stock-based compensation arrangements. When clients need advice on the operation and administration of ESOPs or stock-based compensation agreements, Jason is there to help.

Jason also represents companies in ESOP stock-drop and ERISA breach of fiduciary duty cases. Clients in the midst of corporate transactions seek Jason's counsel on benefits integration before and after the transactions.

Outside The Firm

Jason enjoys bass fishing.

Admissions

- Texas

Memberships

- Dallas Bar Association
- Family Firm Institute
- National Center for Employee Ownership
- Southwest Benefits Association
- Southwest Chapter of the ESOP Association
- The ESOP Association

Education

- Southern Methodist University, Dedman School of Law, JD
- University of Nevada, Las Vegas, BA
- Southern Methodist University, Dedman School of Law, LLM

Recognitions

2007–2009, “The Best Lawyers in Dallas” in ERISA law, *D Magazine*